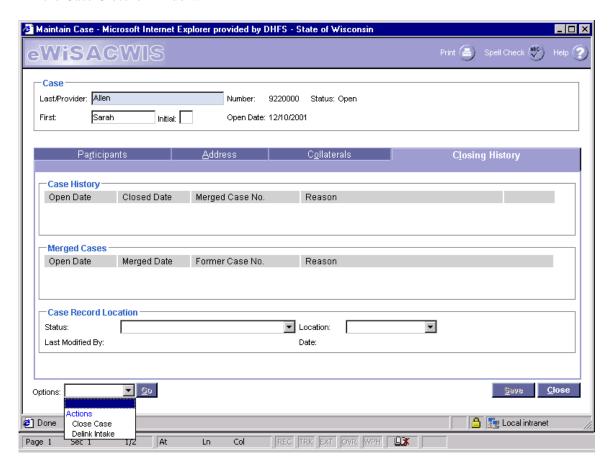
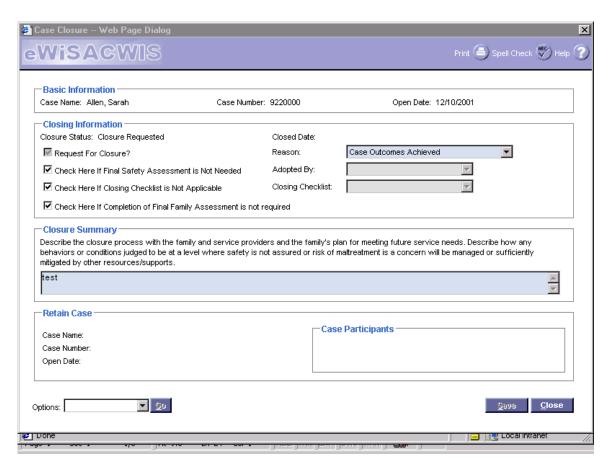
## Initiating the Case Closure Process Day 1 Activity

- 1. Click on the Cases Expando.
- 2. Highlight the case you want to SUBMIT FOR CASE CLOSURE by clicking on the case name. This action will open the case maintenance window.
- 3. Click on the Closing History Tab.
- 4. On the Closing History Tab, go to OPTIONS, select Close Case and click Go. This will open the Case Closure Window.



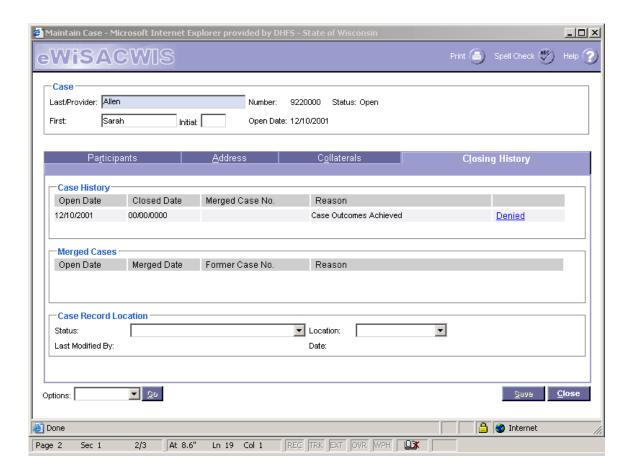
- 5. FOR CPS FAMILY CASES: Check all 4 checkboxes on the left-hand side of the window.
- 6. Select the appropriate Reason value from the drop down list. FOR CPS FAMILY CASES the value to select is "Other".
- 7. Complete the case closure summary narrative.



8. Click the Save Button to save your request. This will schedule the case for a Process Request Case Closure batch program. This batch runs at night and checks for open Out of Home Placements, pending approvals and open payments. This ends Day 1 activity.

## Day 2 Activity

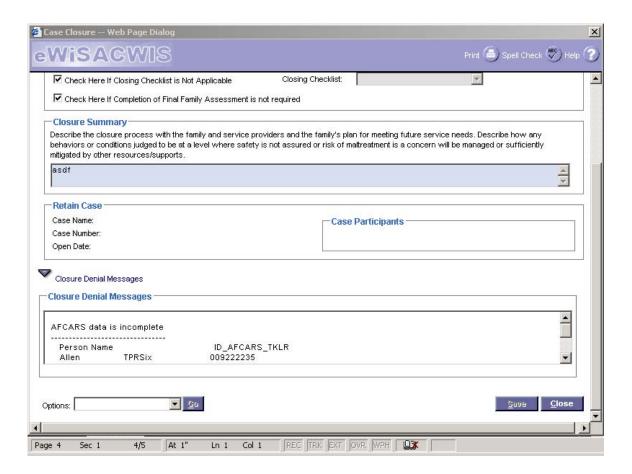
- 1. Click on the Cases Expando.
- 2. Highlight the case you submitted FOR CASE CLOSURE by clicking on the case name one time. This will open the Maintain Case window.
- 3. Click on the Closing History Tab.
- 4. Click the hyperlink on the Closing History field to highlight the line that notes the date of the requested case closure. This will open the Case Closure Window.



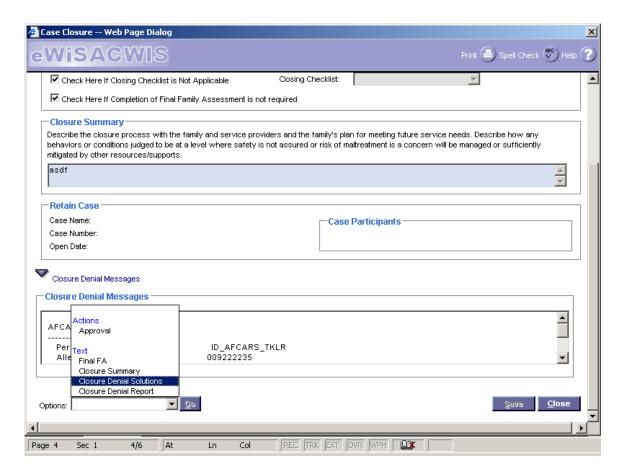
- 5. Check the Closure Status field on the Case Closure Window to make sure the status now reads "Closure Accepted".
- 6. Go to Options and Click on Approve to approve your work.
- 7. Click on the Save Button to send your case closure request to your supervisor for their approval. This will also return you to the Maintain Case Window.
- 8. Click the Save Button to save your changes and return to the Cases Tab.

## The case that I am trying to close is still on my Cases Tab. Why?

- 1. Make sure that you have completed Day 2 of the closure process.
- 2. Verify from your Approvals Expando that both you and your supervisor have completed all necessary approvals.
- 3. Check the Case Closure Denial Expando on the bottom of the Case Closure Page to see why your case was denied.



4. To resolve your Case Closure Denial, access "Closure Denial Solutions" under Options. The Denial Solutions will explain how to resolve the denial.



My case closure request was denied. What do I do?

- 1. Has a new Protective Services Report been linked to your case since you requested your closure? A newly linked intake will deny your request for closure.
- 2. Check your case for open Out of Home Placements, which have not been discharged.
- 3. All Out of Home Placements must be closed before you can proceed with closing the case.
- 4. Check your case for pending payments. All pending payments must convert to outstanding status before you can close the case. In some instances this may be as simple as waiting for a weekly or monthly payment batch to run. In other cases, you may need to contact Bureau of Fiscal Services to determine what is holding up the payment.
- 5. Check to make sure there are no legal statuses for the case, which reflect custody with the agency.
- 6. On the Maintain Window, make sure the Site/Region matches your county.
- 7. Check for any open Plans. All Plans must be terminated. (Case Plan, Permanency Plan, Out of Home Safety Plan, etc.)
- 8. Check the Approvals Expando for any Pending Approvals. After verifying the above information you will need to start over with the Day 2 activities.